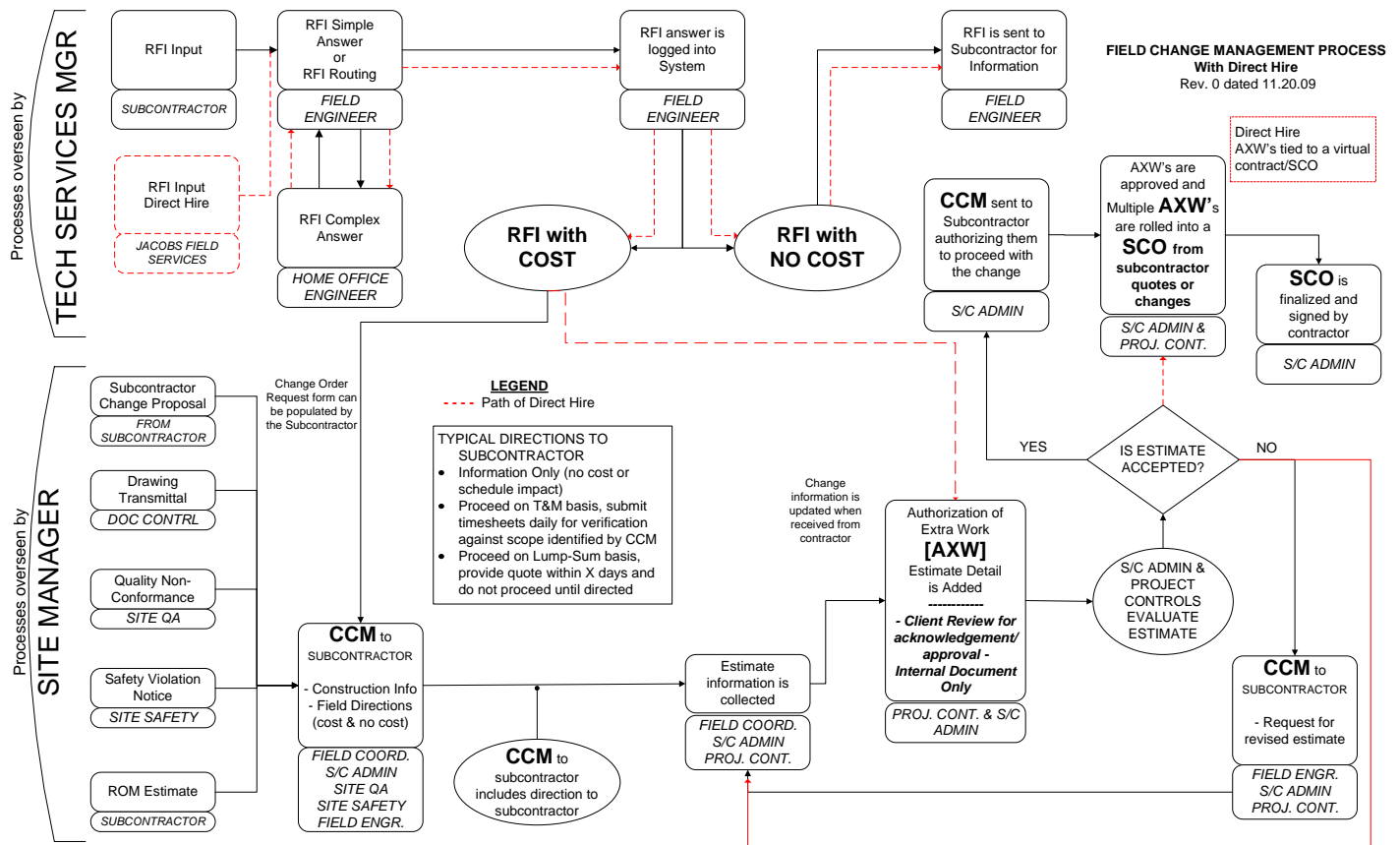


## Submit RFI (Request For Information) Introduction and Instructions




## **Section Explanation:**

To Submit a RFI, we need to implement the following steps:

1. Select Project
2. Create RFI
3. Enter RFI Core Information
4. Enter RFI Notes
5. Enter RFI Impact
6. Enter Courtesy Copies
7. Attach Files
8. Assign W
9. Save RFI
10. Notification Sent/Received

## **Legend Key**

<b>Bold</b>	Converge Field or Menu Item		Select
	Special Note		

- 1) Select your project from the **Portfolio** view.

★ Enter will take you directly to the project data and Edit will display the Project's general information.

PROLOG Converge

Portfolio | Project | Insight | Reports

Please select a project to work in

Refresh List | Export | Toggle Filter | Expand | Collapse | Reset Layout

Drag a column header here to group by that column.

Go To	Edit	Number	Name	Type Of Building
<a href="#">Enter</a>	<a href="#">Edit</a>	999	Master Project	
<a href="#">Enter</a>	<a href="#">Edit</a>	06.10.0424	Midfield Terminal Building Pile Caps & As:	

Figure 1.0

- 2) Select **Create** from The Document Control RFIs Menu

Site Technical Queries

- [Create](#)
- All
- Open/Pending
- My Outstanding STQs
- My Company Records

Figure 2.0

- 3) Enter RFI Info

Enter the following fields:  
**Subject, Importance, Discipline, Category, Author Number** (if applicable), **Question** (Click Add/View Comments...)

The following field will be auto-populated:  
 Number,  
 Date Created  
 Date Required,  
 Author Company,  
 Authored By

★ Several fields may be read-only depending on your permissions

Save and Exit | Copy | Print | Send | Create Link | Word Merge

Project Number: 108 | Subject: TEST | Importance: | Closed

General Info | Notes | Contract Drawings | Collaboration | Impact | Courtesy Copies | Files (0) | Workflow | Links

Date Created: 11/1/2012 | Date Required: 11/8/2012 | Date Answered: | Discipline: Civil | Category: Differing Field Condition

Author Company: Jacobs Engineering Group | Authored By: Jeffrey Stephens | Author I Number: 001

Question: [11/1/2012 Jacobs Engineering Group - Jeffrey Stephens] test

Answer Company: | Answered By: | Co-Respondent: | Answer:

Figure 3.0

## 4) Enter Notes

Select the Notes Tab. Enter the **Suggestion, Spec Section, and Sketch Numbers**

★ Note:

1. Click the Add/View Comments to add the suggestion.
2. Comments may be read-only or not visible

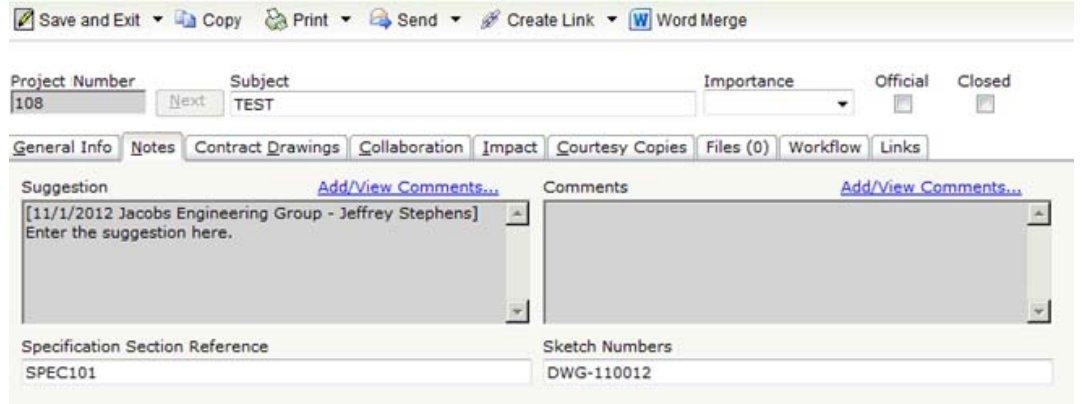


Figure 4.0

## 5) Enter Impact

Select the Impact Tab:

Enter **Cost Impact**

★ Note: If you enter Yes please enter an amount and comments.

Enter **Schedule Impact**

★ Note: If you enter Yes please enter the number of calendar days and comments.

Enter **Drawing impact**

★ Note: Please update the comments and check the Drawing update if applicable.

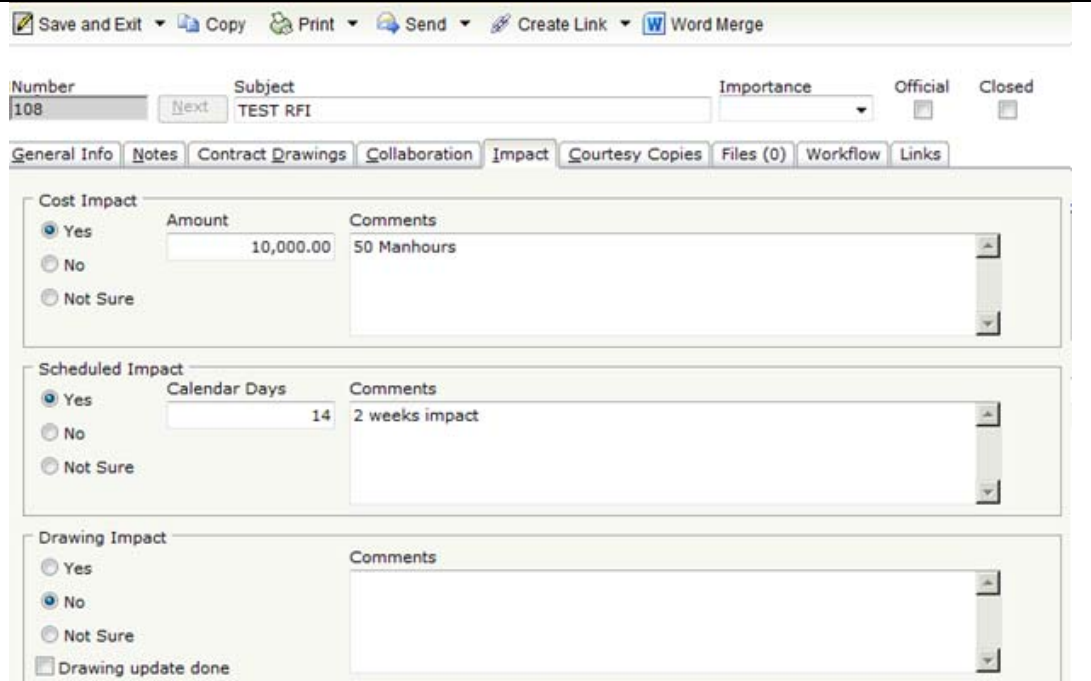


Figure 5.0

## 6) Enter Courtesy Copies

Select the Courtesy Copy tab: Add Contacts individually by clicking the **New** button and selecting or typing the contact name.

Suggested: Click the **Add** button.

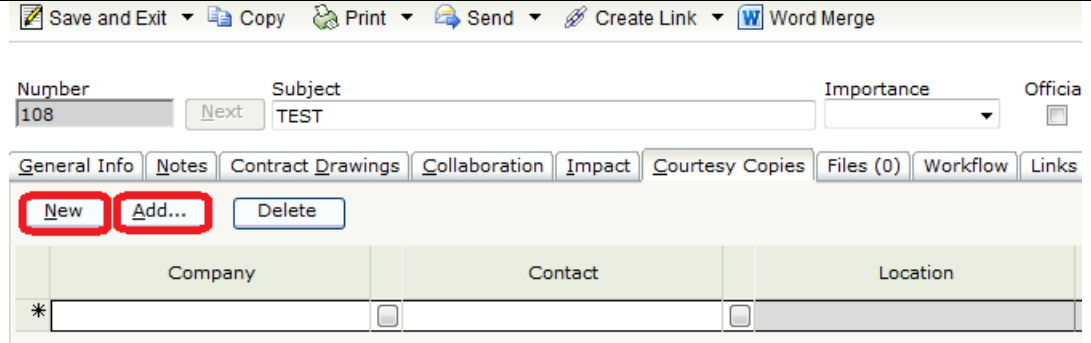


Figure 6.0

Clicking the Add Button will open the Contact Search for users or use the distribution list.

**Contact Search**

Contact ID:  Display Name:  Limit To Project: ☐ Has Email?: ☐

First Name:  Last Name:

Distribution List:

Sel	Display Name ↑	First Name ↓	Last Name ↓	Title ↓	Company
<input checked="" type="checkbox"/>	Charles Feigle	Charles	Feigle	Tech Services Mana...	Jacobs
<input checked="" type="checkbox"/>	Cheryl Wheat	Cheryl	Wheat		Jacobs
<input checked="" type="checkbox"/>	Jeffrey Stephens	Jeffrey	Stephens	Prolog Application S...	Jacobs
<input checked="" type="checkbox"/>	Jodie Rousselle	Jodie	Rousselle	Prolog Trainer	Jacobs

Figure 6.1

## 7) Attach Files

Select the Files tab:  
The most effective way to add files is to use the **Quick Upload** function. You can also select **Attach Upload** function and the Document Manager will display.

Save and Exit Copy Print Send Create Link Word Merge

Number: 108 Next Subject: TEST Importance: Official: Closed:

General Info Notes Contract Drawings Collaboration Impact Courtesy Copies Files (0) Workflow Links

Sel	Type	Description ↑	File Name	File Size (MB)	Folder Path
-----	------	---------------	-----------	----------------	-------------

Figure 7.0

Select the **Browse** button.

**File Upload**

Name	Number	Title	Description
------	--------	-------	-------------

Figure 7.1

Select the Files that you wish to upload.

Update the following fields:  
**Number**, **Title**, and **Description**.

Click the **Upload** button.

**File Upload**

Name	Number	Title	Description
Field Change Management Process	001	Field Change Mgmt	Description
Users.xls	002	User List	Description

Browse
Upload
Remove

Files selected to upload:  
Field Change Management Process 060107 rev 1.pdf  
Users.xls  
2 file(s) selected at 46.14KB

Figure 7.2

The Files will appear in the grid.

Save and Exit Copy Print Send Create Link Word Merge

Number  Next Subject  Importance Official Closed

General Info Notes Contract Drawings Collaboration Impact Courtesy Copies Files (2) Workflow Links

Attach... Add URL... Quick Upload... Get Highlighted Get Selected

Sel	Type	Description	File Name	File Size (MB)	Folder Path
<input type="checkbox"/>	Attachme...	Description	Field Change Mana...	0.02	
<input type="checkbox"/>	Attachme...	Description	Users.xls	0.02	

Figure 7.3

8) Assign RFI

Select the Collaboration Tab. Click the **New** Button:

Enter the **To Contact Information**.

★ Note: You may simply type the contact name in First Name Last Name.

★ Note: The following fields will be auto-populated: From Company, From Contact, Date Sent, Date Received, Action, Sent From, etc.

Save and Exit Copy Print Send Create Link Word Merge

Number  Next Subject  Importance

General Info Notes Contract Drawings Collaboration Impact Courtesy Copies Files (2)

New Insert Add Multiple... Delete Get Files

	From Company	From Contact	To Company	To Contact	Date
*	Jacobs Engine...	<input type="checkbox"/> Jeffrey Stephens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 8.0

## 9) Save RFI

Figure 9.0

## 10) Notification

A Notification similar to the one right will be send to the TO Contact and the Courtesy Copy recipient will be on the CC line.

From: ☐ converge@noreply.com  
 To: ☐ Ardley, Charlie  
 Cc: ☒ Stephens, Jeffrey  
 Subject: SADARA Training Project - STQ 004 Pending Action

Message RFI Detailed.pdf (50 KB)

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**JACOBS™** **STQ Pending Action**

The following RFI is pending your response.

To view additional details about this STQ, you may open the attached PDF.

[To view the full STQ form in the Prolog Converge Web Client, click here.](#)

<b>Project:</b>	SADARA Training Project
<b>STQ Number:</b>	004
<b>STQ Subject:</b>	STQ Subject
<b>STQ Question:</b>	[11/14/2012 Jacobs Engineering Group - Jeffrey Stephens] QUESTION
<b>STQ Suggestion:</b>	[11/14/2012 Jacobs Engineering Group - Jeffrey Stephens] Suggestion
<b>Date Submitted:</b>	14/11/2012
<b>Date Required:</b>	21/11/2012
<b>Action From:</b>	<b>Action Required By:</b>
Jeffrey Stephens	Charlie Ardley

*Note: The STQ process does not authorize scope /schedule/cost changes*

Figure 10.0